



Client Level Services Module

you would like to add session details to. The *Maintain Partner Details* displays.

6. Under **Attempt(s) to Locate**, click **Add New Attempt** to enter attempts to locate the partner. The *Add New Attempt to Locate* displays.
7. In the **Attempt Date** field, type the date the attempt was made to locate the client.
8. Click the **Attempt Outcome** drop-down list, and then select **Locate**.
9. Click the **Enrollment status** drop-down list, and then select **Accept** or **Refused**.
10. Click **SAVE AND FINISH**. The *Maintain Partner Details* displays.
11. Under **Session(s)**, click **Add New Session** to add session information for the partner. The *Add Session Details (for Partner)* displays.
12. In the **Session Date** field, type the date of the session held with the partner.
13. Click all the **Worker(s)** that delivered PCRS services, and then click **ADD TO LIST**.
14. Click the **Site** drop-down list, and then select the site where the session was delivered.
15. In the **Duration of session** field, and type the total number of minutes for the length of the session.
16. Click **SAVE AND FINISH**.



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PCRS CASE SUB MODULE

Open a PCRS Case when the Index Client is Known

1. Click **Client Level Services** on the module menu bar. The *Select Client* screen displays.
2. Click **PCRS Case** on the sub module menu bar. The *Select Client* screen displays.
3. Search for client's name.
- 4a. If the client is not already in the system click **Add new client**. *Add New Client* displays. Continue with step 5.
- 4b. If the client is in the system, click the client name radio button and click **choose client** for the appropriate client and move to step 15.
5. Click in the **Date Collected** field, and then type the date information was collected.
6. Click in the **Local Client Unique Key** field, and then type a unique client key that your agency generates or click the **Check to use PEMS Client Unique Key** checkbox .
7. Click in the **Birth Date – Year** field, and then type the client's year of birth
8. Click the **Ethnicity** drop-down list, and then select the client's ethnicity.
9. Click the appropriate **Race** checkboxes.
10. Click the **State/Territory of Residence** drop-down list, and then select the state where the client resides.
11. Click **Assigned Sex at Birth** drop-down list, and then select the appropriate gender for the client.
12. Click the **Current Gender** drop-down

list, and then choose the appropriate selection for the client.

13. Complete any additional fields, if necessary.
14. Click **SAVE AND FINISH**.
15. Click **PCRS Case** on the sub module menu bar. The *Select Client* screen displays.
16. Click **Add New PCRS Case**. The *Add PCRS Case* screen displays.
17. Click the **Year** drop-down list, and then select the appropriate year.
18. Click the **Program Name** drop-down list, and then select the appropriate program name.
19. Click the **Program Model Name** drop-down list, and then select the appropriate program model name.
20. Click the **Intervention Name** drop-down list, and then select the appropriate intervention name.
21. In the **Case Number** field, type a unique PCRS Case key for your agency, or click the checkbox for **Default to System Generated PCRS Case Number**. The *Maintain Existing Case* screen displays.

Note: *The Maintain Existing Case screen allows you to add attempt to locate, and add partner information.*

Add a PCRS Intervention Session and Elicit Partners

1. Follow steps 1-2 from **Open PCRS Case when the Index Client is Known**.
2. Search for client's name or case number.
3. Click the radio button for appropriate client, and then click **Choose Client**. The *Maintain PCRS Cases* screen displays.





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4. Click **Maintain** for the applicable PCRS Case number you wish to add intervention session and partner detail information to. The *Maintain Existing Case* screen displays.
 5. Under the **Attempt(s) to Locate** section, click **Add New Attempt**. The *Add New Attempt to Locate* screen displays.
 6. In the **Attempt Date** field, type the date the attempt was made to locate the client.
 7. Click the **Attempt Outcome** drop-down list, and then select **Locate**.
 8. Click the **Enrollment Status** drop-down list and then, select **Accept**.
 9. Click **SAVE AND FINISH**.
 10. Click **Interventions** on the sub module menu bar. The *Maintain Intervention Sessions* displays.
 11. Scroll down to the **Intervention Session(s)** section, and then click **Add New Session**. The *Add Intervention Session* screen displays.
 12. Click the **Year** drop-down list, and then select the appropriate year.
 13. Click the **Program Name** drop-down list, and then select the appropriate program name.
- Note:** This should be a program that is set up to deliver Partner Counseling and Referral Services, which in turn will populate the Program Model Name and Intervention Name drop-down lists.
14. Click the **Program Model Name** drop-down list, and then select the appropriate program model name.
 15. Click the **Intervention Name** drop-down list, and then select the appropriate intervention name.
 16. Click the **PCRS Case Number** drop-down list, and then select the PCRS Case number opened for the client.
 17. In the **Session Date** field, type the date of the session the client received services.
 18. Click the **Recruitment Details, Risk Profile, Behavior Details** or **Local Variables**, checkboxes, if applicable.
 19. Click **SAVE AND CONTINUE**. The *Add Session Details* displays.
 20. Click all the **Worker(s)** that delivered PCRS services, and then click **ADD TO LIST**.
 21. Click all the **Delivery methods** that were used based on the program plan, and then click **ADD TO LIST**.
 22. Click any **Delivery Methods not included in Program Plan** that were used, and then click **ADD TO LIST**.
 23. Click all the **Activities included in program plan** (including **Elicit Partners**) that were delivered during the session, and then click **ADD TO LIST**.
 24. Click any **Activities not included in program plan** that were delivered during the session, and then click **ADD TO LIST**.
 25. Include additional information for the PCRS Intervention session (site, duration, unit of delivery, etc.)
 26. Click **SAVE AND FINISH**. The *Maintain Existing Session* displays.
- Note:** The *Maintain Existing Session* screen allows you edit any of the information that you entered.
27. In the **Activity(s)** section, click **Add New Elicit Partner** under **Elicit Partners Activity**. The *Add Elicit Partner Details* screen displays.
 28. Click the **Partner Information Provided** drop-down list, and then choose the applicable selection.
 29. Fill in any information that you have for the total number of partners (including



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- anonymous), number of social network contacts, if the elicitation was done at a venue, enter the date of the week, time of day and venue type.
30. Click **Save and Add Partner Details**. The *Add Partner* screen displays.
31. Click the **Notification Plan** drop-down list, and then choose the applicable selection.
32. Click the **Spouse** radio button, if applicable.
33. Click the **Partner Type** drop-down list, and then choose the applicable selection.
34. Under **Partner Details** section, click **Date Collected**, and then type the date that the Partner information was collected.
35. Click the **State/Territory of Residence** drop-down list, and then select the state the partner resides in.
36. Click **SAVE AND FINISH**.

Open a PCRS Case and Add Partner Information When the Index Client is Unknown

1. Follow steps 1-2 from **Open PCRS Case when the Index Client is Known**.
2. Search by open cases.
3. Click **SEARCH**. The *Select Case* screen displays.
4. Under the **Case(s) – Search Results** section, click **Add New PCRS Case**. The *Add PCRS Case* screen displays.
5. Click the **Year** drop-down list, and then select the appropriate year.
6. Click the **Program Name** drop-down list, and then select the appropriate program name.
7. Click the **Program Model Name** drop-down list, and then select the appropriate program model name.

8. Click the **Intervention Name** drop-down list, and then select the appropriate intervention name.
9. In the **Case Number** field, type a unique PCRS Case key for your agency, or click the checkbox for **Default to System Generated PCRS Case Number**. The *Maintain Existing Case* screen displays.
10. In the **Case Open Date** field, type the date that the PCRS Case was opened.
11. Click **SAVE AND FINISH**. The *Maintain Existing Case* screen displays.
12. Click **Add New Partner**. The *Add Partner* screen displays.
13. Click the **Notification Plan** drop-down list, and then choose the applicable selection.
14. Click the **Spouse** radio button, if applicable.
15. Click the **Partner Type** drop-down list, and then choose the applicable selection.
16. Under **Partner Details** section, click **Date Collected**, and then type the date that the Partner information was collected.
17. Click the **State/Territory of Residence** drop-down list, and then select the state the partner resides in.
18. Click **SAVE AND FINISH**.

Add Session Details for a Partner when the Index Client is Unknown

1. Follow steps 1-2 from **Open PCRS Case when the Index Client is Known**.
2. Search by open cases.
3. Click **SEARCH**. The *Select Case* screen displays.
4. Click the radio button next to the applicable case, and then click **CHOOSE CASE**. The *Maintain Existing Case* displays.
5. Under the **Partner Details** section, click **Maintain** for the applicable PCRS Case